

Make It Easier To Do Business/Customer Focus Subcommittee

Public Session

Monday, February 24, 2014

**Rhode Island Commerce Corporation
315 Iron Horse Way, Providence, RI**

The following were in attendance:

Appointees/Delegates

*Tim Hebert
George Nee
Roland Fiore*

RIEDC Staff

*Marcel Valois
John Pagliarini
Christopher Cannata
Lori Bassett*

Department of Regulatory Reform

Nancy Scarduzio,

Others

Malcolm Baxter

In the absence of Chairperson Karl Wadensten, Mr. Tim Hebert called the meeting to order at 4:08PM. The minutes from the 1/27/14 meeting were approved.

Mr. Cannata gave an update and demonstration on the new CRM package.

CommerceRI went live with the new system on February 3, 2014 and currently has 25 users from multiple departments. The main focus is on best practices and lean processes. Mr. Cannata said it has created a client facing, customer service boost as to how the agency can address and respond to requests coming into the agency. Mr. Hebert asked how the adoption of the system is going within the company. Mr. Valois stated that approximately half of the users are utilizing it as they should be but that is as expected.

Mr. Hebert asked how the data is being handled. Per Mr. Cannata, information from Data.com was purchased with the system; this enables us to bring in 600 records per month. During the month of January, 600 manufacturing records were brought in, approximately 400 records were imported from PTAC, and a substantial amount will be imported from Bryant University. Mr. Valois said the goal is to have 30-40K leads eventually (leads transition to accounts when interaction takes place). Mr. Cannata noted that we will also be importing information from our ACT system at a later date.

Mr. Cannata went on to explain the various types of leads and accounts and how the different departments track these within the system.

Mr. Nee asked about integrating companies into the system that have been getting grants from the Governor's Workforce Board (GWB), Incumbent worker training grants, and/or express grants. These grants are public information so we should be able to get this data. Mr. Hebert would like to have a meeting with the DLT to discuss the coordination of their grants with the CommerceRI CRM system; they will take that as an action item.

Mr. Cannata said that they hope to be doing customer surveys in the near future. Mr. Hebert mentioned Net Promoter Score; it is a measure of client loyalty, one question that basically asks "would you refer others?".

Mr. Valois commended Mr. Cannata and Ms. Jeanine Lucia on the work they've done with the CRM system; he is content with the current timeline. They will be conveying this success to the CommerceRI Board of Directors but at a later date.

The meeting adjourned at 4:57PM.